

ADDITIONAL GUIDELINES  
ON  
HOW TO WRITE POSITION DESCRIPTIONS  
UNDER  
THE FOREIGN SERVICE NATIONAL POSITION CLASSIFICATION SYSTEM

REFERENCE (1) Appendix B (pages B-1/B-11) of the Interagency Handbook on Local Employee Position Classification, (2) A-850 of February 27, 1978, and (3) A-2639 of August 22, 1979, subject: FSN Position Classification Surveys—Presurvey Certification of PDS, complete and accurate position descriptions are a critically important element in the effective implementation and administration of the FSN position classification system. To assist posts in carrying out their responsibilities under the program in this connection, the following additional information is submitted.

WHAT IS A POSITION DESCRIPTION? WHAT PURPOSE DOES IT SERVE?

A position description (PD) is an official record of the work assigned by management to an FSN employee. It is the basis on which the grade of the FSN position is determined and is one of the two factors determining the employee's pay, the other factor being the determination of the salary scale prevailing in that geographic area for the particular kind of work involved in the position.

Other Uses of the Position Description. A PD would be of crucial importance to sound post management if it served only (1) as the official record of the work assigned by management to an FSN employee, and (2) as the basis for making the grade level determination for the position. However, its importance is enhanced by the fact that the PD serves many other uses in the broader area of personnel administration and sound program management. Specifically:

- The PD helps in setting the qualifications used in filling the position and in promoting an employee to the position.
- The PD is a useful tool in training a new employee in his/her duties.
- Other training requirements related to the work of a position can be determined from the duties and responsibilities presented in the PD.
- The duties and responsibilities in the PD are used also in developing performance standards for the work.
- The PD contributes to improved employee morale and efficiency by telling each employee exactly what portion(s) of the work

of the organization he/she is expected to perform, the supervisory levels involved, and how the work fits into the organization.

--- For the American supervisor newly arrived at post, the PDs for his/her program area provide information as to how predecessors organized the work and assigned the activities of the program among FSN staff.

#### WHO PREPARES THE PD?

A PD may be written by anyone who knows the facts about the position. Those most likely to know are the employee (except in the case of a vacant position), the supervisor, and the administrative officer or personnel officer. Frequently, a completed PD is the result of the joint efforts of all these persons and, in some cases, of other persons as well.

The PD should be written as if the position is vacant; this is, it should describe the duties and responsibilities of the position, not the personal attributes of the incumbent(s).

The PD should completely and accurately describe the duties and responsibilities that are actually assigned to the position. To do this, the person(s) preparing the PD should include the following information (REF: B-4/B-11 of the Handbook):

MAJOR DUTIES AND RESPONSIBILITIES (The nature and complexity of the work and the percentage of the time spent on each major duty and responsibility)

EDUCATION (including specialized training)

WORK EXPERIENCE

POST ENTRY TRAINING

LANGUAGE PROFICIENCY

KNOWLEDGES, SKILLS, AND ABILITIES (KSA's) required to do the work (i.e., those KSA's gained from education and/or work experience and/or post entry training which are required and used in doing acceptable work in the position)

SUPERVISION RECEIVED (i.e., supervisory controls exercised over the position)

and

AVAILABLE GUIDELINES and how they are used in doing the work, which affects to a large extent the employee's authority in the

EXERCISE OF JUDGMENT and the

AUTHORITY TO MAKE COMMITMENTS

## NATURE, LEVEL, AND PURPOSE OF WORK CONTACTS

## SUPERVISION EXERCISED OVER OTHER EMPLOYEES

### WHEN IS A PD REWRITTEN?

A PD should be rewritten when there is a significant change in the duties, responsibilities, or supervisory relationships of a position. Such changes come from reorganizations, changes in existing programs, the addition of new programs, and/or the realignment of tasks among the various positions of an organization. It is also sometimes necessary to rewrite a PD simply to update an old one or to replace a badly written one.

### HOW IS A GOOD PD WRITTEN?

Anyone who follows the instructions given in B-1/B-11 of the Handbook should be able to develop a complete, factual, and easily understood PD. However, the following several points are important to remember if one is to assure that a PD describes a position as it actually exists in terms which give the reader a clear understanding of the duties and responsibilities of the position. Specifically:

Major Duties and Responsibilities (REF: Item 14., B-10)

- Use plain, clear language. Avoid words which imply responsibilities or complexities greater than actually exist in the position. For example, do not describe a task as "maintains liaison with representatives of the business community" when the task is "locates and issues various commercial library information as requested by members of the business community by telephone, letter, or personal visit".
- Use active verbs. For example:
  - 0 Posts specific information from purchase documents to stock record cards.
  - 0 Designs art work for posters, magazine covers and other information materials to meet specified needs but with some freedom to use creative judgment.
  - 0 Types letters, memoranda, reports, and lists in final form from handwritten drafts.
  - 0 Develops overall budget proposals for the program, based on approved estimates submitted by the six divisions in the organization.
  - 0 Assists callers to the visa section by issuing visa applications forms, explaining instructions for their completion, and checking completed forms for accuracy and completeness.

- Describe incidental or occasional duties in such a way as to explain how often they occur. For example:

0 Once a month...

0 In the occasional absence of...

0 As requested during peakloads...

0 In emergencies...

0 For those positions which may involve incidental or occasional duties of various types, the statement "Performs related duties from time to time as assigned" may be included in the PD.

- Indicate the percentage of time spent in carrying out each major segment of the assigned duties and responsibilities.

A simple rule to bear in mind when writing a PD is that each major duty and responsibility is best described on a WHAT, HOW, WHY basis. For example:

WHAT

HOW

WHY

Files various materials  
in three separate filing  
systems.....

.....according to an alphabetical  
(procurement item), a  
chronological (procurement  
date), and a numerical  
(voucher number) system,....

.....which files  
serve as a  
complete record  
of all procure-  
ment transactions  
at post, and as  
the source docu-  
ments in support  
of the accounting  
system for procure-  
ment transactions.

#### DESIRED QUALIFICATIONS (REF: Item 15.a./f., B-11)

The instructions given in the Handbook concerning Education, Prior Work Experience, Post Entry Training, and Language Proficiency (item 15.a/d., B-11) are adequate to the needs of posts in preparing position descriptions. However, it is important to provide additional guidance regarding Knowledges (item 15.e.) and Abilities and Skills (item 15.f.).

## I. Knowledges required by the Position (REF: Item 15.e, B-11)

It is frequently the case that an FSN employee brings to a position knowledges and skills which exceed those required and used in doing acceptable work in the position to which assigned. It is very important that the PD include only the nature or kinds of knowledges (and abilities and skills) actually needed and describes how these are used in doing the work of the position.

Knowledges are information or facts such as procedures, work practices, rules and regulations, policies, theories and concepts, principles and processes which the employee must know to be able to do the work. These may be acquired by pre-employment education and training, work experience, or post entry training (on-the-job or by training courses), or by a combination of these.

The following are examples of good descriptions of knowledges required by a position and how these knowledges are used in doing the work of the position.

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<u>Knowledge Example #1</u>	<u>Economic Specialist</u>
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|-----------------------|--|
| a. Kind of Knowledge: | A thorough knowledge of the host country's economy, economic structure and institutions, and foreign and domestic economic policies  |
| b. How Used:          | to (1) advise American officers at post and official visitors on politico-economic aspects of binational negotiations, on current developments affecting existing and potential economic policy bearing upon the post's commercial program; and to (2) plan and execute complex economic research and reporting assignments. |

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<u>Knowledge Example #2</u>	<u>Visa Clerk</u>
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|-----------------------|---|
| a. Kind of Knowledge: | Knowledge of operating procedures relating to a limited range of visa services performed by the employee, including                         |
| b. How Used:          | taking fingerprints and completing fingerprint cards, performing simple filing, counting and sorting visas, and distributing incoming mail. |

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<u>Knowledge Example #3</u>	
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|-----------------------|---|
| a. Kind of Knowledge: | Knowledge of English grammar, spelling, and punctuation |
|-----------------------|---|

b.. How Used:

to correct obvious errors on material  
being typed.

## II. Abilities and Skills required by the position (REF: Item 15.f., B-11)

On the whole, few qualification requirements will be listed as "abilities:". It is usually easier to reflect such requirements as a knowledge or as a skill.

It is also sometimes easier and more useful to describe a requirement as a skill rather than as a knowledge. A knowledge exists before a skill can be demonstrated. For example: A person who knows the typewriter keyboard can acquire a particular level of proficiency through practice leading to "skill in typing". Skills usually can be observed so it is common practice to describe skills as a certain dexterity. For example: Skill in cutting, sewing, stretching, and tacking fabrics of various patterns, thicknesses, and types in upholstering a variety of office and household furniture.

The following are examples of good descriptions of skills requirements.

Skill Example #1	Voucher Examiner
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|-------------------|--|
| a. Kind of Skill: | Skill in using a calculator  |
| b. How Used:      | to compute totals, discounts, taxes, transportation charges, and other cost information on vouchers. |

Skill Example #2	Stenographer
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|------------------|--|
| a. Kind of Skill | Skill in taking shorthand dictation  |
| b. How Used:     | to record and transcribe dictated letters, memoranda, reports, and other materials in rough draft. |

Skill Example #3	Mechanic (Carpenter)
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|-------------------|---|
| a. Kind of Skill: | Skill in the use of the several tools of the trade (including hammers, drills, planers, screw-drivers, levels, and measuring devices) |
|-------------------|---|

- b. How Used: to repair and renovate existing office and residential buildings and interior and exterior fittings, and to perform carpentry work on new construction sites.

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If you are not sure whether to describe a requirement as a knowledge, an ability, or a skill, describe it as a level of knowledge.

### III. Cautions in stating desired qualifications:

Posts are cautioned to take great care in stating the desired qualifications for a position, whether it be education, prior work experience, post entry training, language proficiency, knowledges, or abilities and skills. Several areas of item 15 of B-11 deserve particular attention. Specifically:

- Excess education requirements or arbitrary degrees of proficiency should not be described. There should be evidence of how any requirement specifically applies to one or more tasks of the position being described. IF A STATED KNOWLEDGE, SKILL, OR ABILITY CANNOT BE DIRECTLY RELATED TO A DUTY OF A POSITION, IT SHOULD NOT BE INCLUDED IN THE PD.
- Show only knowledges, skills, and abilities (KSA's) that are essential for satisfactory performance of the work.
- Most positions require no more than four or five KSA's. If you have a much longer list of KSA's some of them can probably be combined into broader categories.
- Label a knowledge as "professional" only when the nature of the work meets the definition of a professional occupation, that is:

"Professional occupations or series are those that require knowledge in a field of science or learning customarily and characteristically acquired through education and training that meets the requirements for a bachelor's or higher degree with major study in or pertinent to the specialized field, as distinguished from general education. The work of professional positions is creative, analytical, evaluative, or interpretive, and is characterized by personal responsibility to keep abreast of and exercise judgment and broad perspective in the application of an organized body of knowledge that is constantly studied to make new discoveries and inter-

pretations or to improve the data, materials and methods".

- Although there are some positions for which an ability or abilities should be stated in the PD, avoid listing "abilities" when a requirement can be described as a "knowledge" or a "skill". For example, "ability to examine vouchers" is too vague since it does not show what the employee has to know to do the examination. It is possible that such ability requirement would require extremely different knowledges among several positions. To illustrate:

#### WRONG

Ability to examine Vouchers.

Ability to examine vouchers and transportation accounts.

#### BETTER

Knowledge of travel regulations to check travel vouchers for compliance with such regulations, for accuracy of terminology, and for correctness of travel computations.

Knowledge of professional accounting concepts, principles, and theories to audit the total accounting system.

- Do not include in desired qualifications such personal characteristics as enthusiasm, patience, adaptability, integrity, or creativity.
- Doublecheck any listed knowledges, skills, and abilities in a completed PD to assure they agree with the duties described. For example, if you list "skill in operating an electric typewriter", the major duties and responsibilities of the PD should show that the employee types. JOB-RELATEDNESS is the key to good statements of desired qualifications.

#### POSITION ELEMENTS

- I. Supervision Received (REF: item 16.a., B-11). Each PD should indicate the title and position number of the supervisor of the position.

"Supervision Received" has three parts:

- How the work is assigned.
- The employee's responsibility for carrying out the work.
- How the work is reviewed.



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0 How is the work assigned? Supervisors have direct or indirect controls over the work in the way assignments are made, instructions are given, priorities and deadlines are set, and objectives and boundaries are defined. For example, a supervisor may make assignments

- \* with detailed instructions as to how to do the work;  
or
- \* with instructions only for new, difficult, or unusual aspects of the work;  
or
- \* with suggestions only for procedures;  
or
- \* with information only about the objective to be achieved and any priorities or deadlines.

0 What is the employee's responsibility for carrying out the work?

This deals with the extent to which the employee is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives. For example, an employee may

- \* do the work exactly as instructed;  
or
- \* do routine assignments independently without specific instructions;  
and/or
- \* refer situations not covered by instructions to supervisor;  
or
- \* handle all work independently according to policies, previous training, or accepted practice;  
and/or
- \* resolve problems which arise by determining approaches to be taken and methods to be used.

0 How is the work reviewed? This deals with the nature and extent of the review of work. For example, there may be

- \* close and detailed review of each phase of the assignment;  
and/or
- \* detailed review of the finished work;  
or
- \* spot-check of finished work for accuracy;  
or
- \* review only for adherence to broad policy or procedure.

- 0 Note: "Supervision Received" in the employee's PD should agree with "Supervision Exercised" in the supervisor's PD. For example, if the employee's PD states that the work is accepted as being technically accurate without review, but the supervisor's PD states that detailed review is given the employee's work, one of the PDs is wrong. The facts must be rechecked and appropriate changes made in at least one of the PDs.

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Supervision Received Example #1

Payroll Clerk

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- a. How work assigned: Supervisor gives regular technical supervision and assistance during the payroll cycle.
- b. Employee response: Routine work is performed independently following set procedures. Employee seeks help from the supervisor on difficult problems or regarding the interpretation and application of regulations to specific cases.
- c. How work reviewed: Pay, allowances, and leave computations are regularly reviewed by the supervisor.

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Supervision Received Example #2

Program Assistant

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- a. How work assigned: Supervisor makes factual and statistical reporting assignments which are accompanied by clearly defined instructions or precedents.
- b. Employee response: Independently collects and evaluates the relevance and reliability of information, organizes and presents statistical data, and monitors developments in a selected activity or project.
- c. How work reviewed: Work in progress receives general supervision only except as unusual problems arise. Completed work receives close review.

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II. Available Guidelines and Exercise of Judgment (REF: Items 16. b. and c., B-11)

These position elements relate to:

- The nature of guidelines for performing the work.
- The judgment needed to apply the guidelines or to develop modified or new guides in order to satisfactorily carry out the

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work to be performed.

- 0 What guidelines are used in doing the work? Guides may be operating procedures and policies, traditional practices, or references such as desk manuals, dictionaries, style manuals, program handbooks, catalogs, and blueprints and drawings. They are any written or formally stated directions designed to aid employees in getting work done satisfactorily.

Individual jobs vary in the degree to which the guidelines are specifically applicable and available for doing the work. For example, a reference librarian has a detailed reference guide in the card catalog which may be used to locate all books requested under the name of a specific author. However, the same reference librarian may have more difficult and less specific requests for reference services to which the card catalog is not so specifically and directly applicable, and which leave some latitude for use of personal judgment.

- 0 How much judgment is needed in using the guidelines?

In performing the work of a position, the existence of specific instructions, written procedures and policies, handbooks and manuals, and the like may limit the opportunity of the employee to interpret and adapt the guidelines, to develop new guidelines, or to plan and conduct work in some special manner due to the absence of guidelines. On the other hand, very general, out-dated, or otherwise inadequate guidelines or the absence of a specific method for any phase of the work may require the employee to use considerable judgment in applying inadequate guidelines or in developing appropriate guidelines.

It is extremely important to explain the nature of guidelines in a PD and to indicate the extent to which the employee follows them explicitly or uses judgment in deciding between alternatives in interpreting, in adapting, or in developing guidelines.

#### Available Guidelines and Exercise of Judgment Example #1 File Clerk

- a. **Guides:** Written and oral guides provide specific instruction for filing materials.
- b. **Judgment:** Most of these instructions are easily memorized and little interpretation is necessary. When instructions do not apply, the problem is referred to the supervisor.

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Available Guidelines and Exercise of Judgment Example #2 Commercial Specialist

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- a. Guides: Guidelines include trade promotion and other general regulations, procedures, and policies governing programs and activities of the commercial section, including procedures for the collection and analytical reporting of market research, trade promotion, and other commercial data.
- b. Judgment: As a recognized expert, substantial reliance is placed on the employee to independently plan and carry out research reporting and other assignments within the prescribed reporting schedule, according to prescribed basic content of reports, and consistent with other general guidelines. Beyond the requirement of adherence to these general guidelines, the employee uses personal judgment in determining the breadth and depth of reporting assignments and in deviating from prescribed reporting procedures in the interest of providing the most complete and appropriate data.

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III. Authority to Make Commitments (REF: Item 16.d., B-11)

This position element relates to the extent to which the employee is permitted to carry out responsible work of the position without clearance with the supervisor or others. These commitments have the effect of binding the organization or higher authority to a course of action.

In many positions, the work is such that commitment authority is not a factor, as in the case of routine clerical positions or positions covered by detailed guidelines. In any case, if this is an acknowledged factor in a position, the PD should carefully describe the TYPE, SCOPE, AND EFFECT of such authority, and should cite examples. Also, this element in the PD should be consistent with related information given in the PD regarding Supervision Received, Exercise of Judgment, and Major Duties and Responsibilities.

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Authority to Make Commitments Example #1 Visa Specialist

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Type of Authority: Has authority to determine which visa cases require further investigation and

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possible exceptional action, without prior approval of the American supervisor.

## Scope:

This authority involves the full range of visa services in the consular section which has a substantial number of complex and sensitive cases.

## Effect:

These decisions impact the expeditious, efficient and proper disposition of complex, unusual, and questionable cases.

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Authority to Make Commitments Example #2      Budget Analyst

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## Type of Authority:

Commitments are limited to advising the supervisor regarding minor reprogramming of original budget estimates as requested by occasional changes in operating programs

## Scope:

for three segments of the post's budget.

## Effect:

This advice assists the supervisor in making decisions as to how this reprogramming will be accomplished within well-established and accepted budget practice.

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IV. Nature, Level, and Purpose of Contacts (REF: Item 16.e., B-11)

This position element covers the people the employee deals with in the work, the conditions under which contacts are made, and the reasons for contacts. To avoid misunderstandings, this section of the PD should clearly indicate the nature of work relationships and any unusual circumstances or conditions involved. For example: A secretary may have contacts with high-level officials of the host country government. These contacts are generally easily made and free of problems, and are for purposes of transmitting specific information, arranging appointments, and relaying requests on behalf of superiors. On the other hand, a political specialist may have the same level of contacts, but these are difficult and sensitive contacts because of the purposes involved (that is, to gauge the probable reaction of the host government or its political leaders to U.S. views or proposals, to explain bilateral foreign policies, and to assess a wide range of past, present, and possible future political developments).

V. Supervision Exercised (REF: Item 16f., B-11)

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To assist the position classification process, this position element should indicate the number, kind, grade levels, and position numbers of employees supervised. In describing the nature of supervisory control exercised, identify any position(s) that receive supervision which is different from that of the staff as a whole. For example: "As unit supervisor, the employee makes assignments, provides procedural instructions and deadlines, is available to assist on problems, and reviews completed work of the staff of three visa clerks FSN-1415-4-V16, three visa clerks FSN-1415-6-V20, and a visa assistant FSN-1415-7-V17. However, as position V16 is considered a trainee position, the incumbents of V16 are given closer instruction(s), supervision and review on the more difficult assignments".

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